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**Report Highlights:**

**The citrus industry continued shrinking in MY2002 as production and exports both fell. The sector's volume of production and exports is rapidly dropping. Farmers continue to refrain from making large investments in their operations because of the chronic low profitability of the crop. High price for water, reduction of water quotas and increasing competition in traditional export markets are the main and lasting problems of the Israeli citrus industry.**

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
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## Executive Summary

Expectations for improved profitability in MY2002 slowed down the pace, but did not stop the shrinking of the citrus industry. At the beginning of MY2002, the total area was 17,546 hectares, 7 percent lower than in the previous year and 26 percent lower than five years ago. The total production reached 490 thousand metric tons (tmt) in MY2002, seven percent lower than the previous year and twenty percent lower than in MY2000. Of the total 490 tmt that were picked and marketed, 118 tmt (24 percent of the total compared to 26 percent in MY2001) were exported, 238 tmt (49 percent) were delivered to processors and 134 tmt (27 percent) was consumed fresh. The economic importance of Israel's citrus industry is declining steadily: its share of the total agricultural production value has dropped from 8.1 percent in CY1990 to 4.9 percent in CY2002. Similarly, its share of total exports (excluding diamonds) fell from 2.1 percent in 1990 to less than 0.4 percent in 2002. Production conditions during crop year 2002 were normal and the growers did not suffer from major production problems. Water shortage and low profitability, which have been the main problems for the citrus industry continued during MY2002 and will likely remain in the future. Israel exporters did not confront serious marketing problems during MY2002. Prices for exported citrus, in local currencies were similar to those in the previous year but favorable exchange rate between the Euro and the Israeli Shekel contributed to the slightly improved profitability in MY2002. Average consumer price for fresh oranges, grapefruit and tangerines in the domestic market was 8 - 13 percent higher than the year before. Prices for processed citrus, which are quoted in dollars, were similar to those of the previous year, but the higher exchange rate increased the price in sheqels for processed fruit by almost 7 percent above its price in MY2001. The local industry estimates that the total farm gate income per hectare for MY2002 was 8 - 10 percent higher than in MY2001. Due to smaller yield and increased production cost (mainly water), profitability is expected to improve by only 2 percent. Continuing low profitability, together with aging orchards and persistent water problems, can be expected to be the key causes for continued uprooting of citrus orchards, albeit slower pace than in recent years. As in the past, most uprooted area will consist of Sweetie, white and red grapefruit and Shamouti oranges.

According to a new law - the "Production Councils Merge Law", the Citrus Marketing Board of Israel (CMBI), which was active in production and marketing of citrus for more than 65 years will be closed at the end of 2003. Its activities will be taken over by the Fruit Board (Production and Marketing).

The main problem of Israel's citrus industry, is the continuation of low profitability. Low profitability is primarily a result of increasing production cost and the steadily increasing competition from other countries, mainly Spain and Morocco.

### Long Term Outlook

In the future, due to low profitability, the citrus industry is expected to shrink to a level that can satisfy local fresh demand and the reduced needs of the processing industry. Exports are expected to be aimed at specific niches in foreign markets. Total production will vary from 450 to 500 tmt. Planted

area may drop to as little as 10,000 to 12,000 hectares within 5-7 years.

**Table 1: Summary Table of Citrus Production and disposition: MY1992-2002**

Thousands of Metric tons

Species	Market Year	Total Production	Total Exports	Delivery to Processing	Fresh Consumption
Oranges	1999	327	89	142	96
	2000	218	71	85	62
	2001	160	34	64	62
	2002	140	19	56	65
Grapefruit	1999	259	98	141	20
	2000	215	40	159	16
	2001	192	53	124	15
	2002	175	46	112	17
Easy Peelers	1999	120	35	45	40
	2000	80	30	26	24
	2001	83	25	28	30
	2002	85	28	27	30
Lemons	1999	18	1	2	15
	2000	16	0	1	15
	2001	20	1	4	15
	2002	23	2	5	16
Sweetie	1999	65	23	39	3
	2000	71	23	43	5
	2001	59	15	39	5
	2002	52	13	36	3
Other	1999	11	8	0	3
	2000	15	9	0	6
	2001	12	9	1	2
	2002	15	10	2	3

Total Citrus	1999	800	254	369	177
Species	Market Year	Total Production	Total Exports	Delivery to Processing	Fresh Consumption
	2000	615	173	314	128
	2001	526	137	260	129
Forecast Total	2003(*)	510	125	250	135

Source: Citrus marketing Board of Israel (CMBI) annual publication. 2002 - the figures are based on CMBI weekly summary and estimations by MOA.

\*Preliminary estimation for the conclusion of the export season.

\*\*Based on forecast by citrus Grower Organization and CMBI

## Production

Total production of citrus in MY2002 was 7 percent lower than that in MY 2001 and 20 percent lower than the production level two year ago. This is a combination of a process that started a few years ago, which came as a result of increase production cost. This also came as a result of insufficient cultivation being given to many orchards, due to low profitability and high price for water. Production in MY2002 totaled 490 thousand metric tons(TMT), compared to 526 tmt in the previous season and 615 tmt, two years ago. Reduction in total production is mainly the outcome of the continuation in citrus uprooting, mainly in the most important growing regions.

## Planted Area

Total planted area at the beginning of MY2002 totaled 17,546 hectares, 1,266 hectares less than at the beginning of the previous year. The main reasons for the uprooting of citrus are: relatively low profitability, competition from urbanization process, mainly in the central part of the country, which is facing increasing water problems. The low profitability in the citrus industry, prevented growers from making increase water payments over the last decade. A census conducted by the CMBI at the beginning of MY2002 indicated the following distribution of the planted area by species.

**Table 2: Distribution of Planted Area by Species - %**

	2002	2002	2001
Variety	Hectares	%	%
Shamouti	3,052	17	20
Valencia	1,413	8	10
Navles	863	5	4
Total Oranges	5,328	30	34
White Grapefruit	1,747	10	10
Red Grapefruit	2,044	12	13
Sweetie	1,458	8	9
Total Grapefruit	5,249	30	32
Tangerines	4,730	27	24
Lemon	1,689	9	6
Other Citrus	550	4	4
Total	17,546	100	100

Source: CPMBI census 10/2002

Due to expectation for favorable exchange rate between the Euro and the Shekel, only 1,266 hectares of citrus were uprooted during the summer of 2002, compared to 4,130 hectares during the summer of 2001 and 2,370 hectares in 2000. The main uprooted varieties include Sweetie, some "Red" grapefruit and Shamouti oranges, mainly in the family farm sector.

**Table 3: Main Uprooted Varieties - hectares**

Variety	Hectares - Uprooted
Shamouti	251
Sweetie	167
Red Grapefruit	143
Lates	118
Mineola	103
Nova	89
Total	871

Source: CMBI census, August 2002

Due to expanded processor demand for white grapefruit, MOA and CMBI sources think that the area under white grapefruit has reached its minimum level and uprooting of this variety can be expected to stop, at least for the near future.

During the crop year of 2002, approximately 200 hectares of citrus were planted and another 50 hectares were replanted. The main varieties planted are those of the easy peelers, mainly the new "Or" variety, which shows great success in export market.

**Table 4: Leading Varieties in Planting in 2002 - hectares**

Variety	Hectares - Planted
Or	89
Early Sechumas	28
Newhall	25
Shamouti	22
Michal	18
Lemon	17
Total	199

Source: CMBI census, August 2002

Despite the uprooting of old orchards and replanting of other orchards, the average age of Israeli orchards is still very high: nearly 60 percent of the bearing trees are over thirty-five years old, mainly the Shamouti, grapefruit and the Valencia. The old orchards are characterized by low yields, high sensitivity to many kinds of pests and diseases. The continuing low profitability of citrus discourages farmers from replanting the old orchards. Due to competition from urbanization and increasing water shortage in the central regions of the country, the trend of moving to the peripheral regions also continued in 2002.

**Table 5: Distribution of Planted Area by Region - percent**

Region	1980	1993	2000	2002
North and Galilee	3.9	6.9	10.0	11.0
Inner Valley	7.9	7.4	8.0	8.5
Center	71.1	64.6	49.0	46.0
Lakhish and Negev	17.1	21.1	33.0	34.5
Total	100.0	100.0	100.0	100.0

Source: Census executed by CMBI - August 2002

## **Production Conditions**

Production conditions in the spring and summer of 2002 were normal, but shortage of water during the irrigation season as a result of water quota cuts, mainly in central Israel, caused irregular irrigation regime in many orchards. The result was reduced yields per hectare, mainly for oranges and grapefruits. Precipitation during winter 2002/03 was between 30 and 40 percent higher than the long term average. This reduced the need for irrigation during the spring of 2003 and gave a good start for the next season. However, this will not change the long-term policy of the government of reducing water quotas for orchards by 50 percent.

## **Production Problem**

Israel's chronic water shortage and the increased price of water has had a serious effect on production decisions in recent years. Aging groves and declining average yield in Shamouti and Valencia are the main causes of consistent losing seasons. Average yields of less than 40mt per ha cannot yield profits even with the current season's higher farm gate prices.

Continuous drought in the Middle East accentuated Israel's water problems. The government reduced water quotas for some field crops by almost 70 percent and in many orchards by 50 percent. Recently water charges were raised by 48 percent over the previous season. This was part of a new policy, "The Policy for Preservation of Green Areas". This policy, adopted by the MOA, intends to raise the price of water for agriculture to its real cost which was calculated as NS 1.46 per cubic meter at December, 2002. The growers will be compensated by a fixed payment per cultivated hectare, in accordance with what they grow, field crops or fruit orchards, irrigated or unirrigated cultivation. It became clear to the industry, that the continuing low profitability, which appears to be permanent, has become a strategic danger for the citrus industry. This problem, which mainly derives from marketing conditions abroad, deters the growers from making large investments. In the future, irrigation of citrus orchards will be permitted only with recycled water.

Since the quantities of recycled water are also limited, citrus will have to compete with other crops if it is to continue to survive. Several analysts expect that the citrus industry will fail to compete due to low profitability and the total planted area with citrus will continue to shrink to a level that can fulfill the local demand. Due to the Intifada, entrance of Palestinian workers, who provide most of the manpower during harvest season, was banned during MY2000 and MY2001. During MY2002, approximately 35,000 Palestinians received work permits. Therefore, manpower was not a significant problem for the citrus industry in this year.

## **R & D**

Israeli Research & Development has failed to offer new varieties that can fit the changing demand in foreign markets. The lack of R & D solutions is partly blamed for Israel's losses in key export markets.

In recent years, R & D efforts have succeeded in offering the new easy peeler "Or", which already shows great success in Europe and in the United States. According to industry, main R & D efforts are

now aimed at niche markets. As a result 150 different varieties of citrus are under observation by Volcani Institute, together with field extension staff. It is expected that only 10 percent of these varieties will enter the market at the end of the research process. Other R & D targets include yield increase, resistance to high salinity in recycled water, natural immunity against pests and disease and biological pest control.

### **Profitability**

Although the average yield per hectare will be lower than in MY2001 and despite the higher price for water, profitability of the citrus industry in MY2002 is expected to end slightly higher than the previous year (2 percent). The main reason is the improved income per marketed ton. Price for exported citrus in Europe in New Shekel (NS) terms is almost 30 percent higher than during the previous export season. Local market prices were between 7 and 13 percent higher than in MY2001. The improvement in profitability in 2002, which is an exception, is expected to have only slight effect on slowing the declining trends observed in the throughput of the industry.

### **Consumption**

Domestic consumption of fresh citrus was estimated by the CMBI at nearly 170 tmt as a long term average. This traditionally included 20 tmt, which were exported to Palestine. In recent years, a decrease in consumption for fresh citrus (mainly oranges and Easy Peelers) has been recorded. Local consumption in last few years has stabilized at 150 tmt (including Palestinian consumption). The decreased consumption of fresh fruit is explained by either shortage of fruit in the markets, or by increased consumption of citrus juices of all kinds. The shortage in the domestic market raised the consumer price by between 8 and 13 percent over its price in MY2001. Total consumption of fresh citrus in MY2002 is estimated at 134 tmt, (excluding 15-20 tmt shipped to the Palestinian Authority - PA), four percent higher than in the previous year. Out of ten processing plants, ten years ago, only three are left. The annual processing capacity of the three processing plants is about 500-600 tmt. The drop in total production also has affected the processing plants which in recent years have been receiving only 250 tmt, compared to 500-700 tmt in previous years. The processing plants meet this shortage in raw material by offering higher price for the citrus, importing concentrates, operating processing plants in Spain or Eastern Europe and by producing of high value added products, such as frozen and fresh juices. It is expected that in MY2003 the total quantity for processing will be 250 tmt. The shortage of citrus is concentrated in the grapefruit sector. This caused processors to offer higher prices for grapefruit for processing than in the past. The processors have also learned to utilize the Sweetie variety, efficiently and took delivery of 36,000 metric tons in MY2002 - almost three times more than was exported.

### **Trade**

Israel's competitors lacked citrus in MY2002, mainly at the peak of Israel's export season. The market in Europe was open to Israeli citrus. It was an opportunity for Israeli exporters to increase their market share, which has been in decline in recent years. However, exports in MY2002 will end by and

estimated 15 percent lower than in 2001 and more than 50 percent below MY1999. The reason lies in the decreased production of citrus of all kinds. Western Europe's share of Israel's citrus exports for many years was as high as 70 percent of the total. This has, however been dropping steadily, reaching 41 percent in MY2001 before increasing to 48 percent in MY2002. Israel channeled exports previously shipped to Europe, to Japan, Eastern and Central Europe and the former soviet Union (FSU). Approximately 20,000 metric tons were sold to the Palestinian Authority (PA). This has, however, been the multi annual average consumption by the PA, after dropping as much as 50 percent in MY2001, due to the Intifada. Despite strenuous efforts to expand Sweetie exports, the quantity sold was low. A few years ago Israeli exporters planned to export 3 million boxes of Sweetie, mainly to Japan. However, exports to the Japanese market have been dropping from season to season. At their peak, Sweetie exports to Japan totaled 1.4 million boxes. MY2000 ended with 1.20 million, in MY2001 only 743 thousand boxes were shipped to Japan and MY2002 ended with 598 thousand boxes. Another 370 thousand boxes were exported to China, South Korea, Russia and Western Europe.

**Table 6: Fresh Citrus Exports by Main Groups: October - End March**

Thousand of Boxes

				% change	% change
Variety	MY2002	MY2001	MY2000	02/01	02/00
Oranges:					
Shamouti	931	1,532	2,648	-39	-65
Valencia (*)	8	335	48	-98	-83
Navels, Trovita, Newhall	30	53	99	-44	-70
Total Oranges	969	1,920	2,795	-50	-65
Grapefruit:					
White	371	544	699	-32	-47
Red Blush	1	0	0	-	-
Sun Rise	1,751	1,935	2,196	-10	-20
Ray Ruby	6	4	40	50	-85
Total Grapefruit	2,129	2,483	2,935	-14	-27
Sweetie,	1,024	1,141	1,6,72	-10	-39

Source: CMBI

(\*) Data on Valencia exports in MY2002 does not give a clue on the final results for 2002, due to the fact that the Valencia season is delayed due to the late winter.

**Table 7: Citrus Exports to the European Union to the Third Week of March 2002**

Metric Tons

Variety	Total Exports	Of which to EU	% of Variety in 2002	% of variety in 2001
Oranges	13,560	12,374	67	91
White grapefruit	5,196	1,624	31	27
Red grapefruit	25,240	10,520	42	39
Sweetie	12,890	3,742	29	5
Total grapefruit	43,326	15,886	37	37
Easy Peelers	29,174	12,232	42	30
Lemons	1,556	1,012	65	75
Others	10,470	2,512	24	19
Total	98,086	47,141	48	41

Source: Citrus Marketing Board of Israel.

**Table 8: Trade Matrix - Fresh Oranges Export - \$000' (HS0805100)**

Destination	CY2002	CY2001
US	112	106
France	1,435	1,203
Germany	-	661
United Kingdom	4,287	10,894
Holland	783	1,560
Other EU	6,712	9,609
Total EU	13,21	23,927
Other Europe	1,012	2,172
Japan	-	-
Other Asia	27	209
Others	479	2,966
Total	14,847	29,380

Source: Central Bureau of Statistics (CBC). 2002 unpublished worksheets.

**Table 9: Trade Matrix - Fresh Grapefruit Export - \$000' (HS0805400)**

Destination	CY2002	CY2001
US	52	73
France	382	508
Germany	-	-
United Kingdom	34	170
Holland	28	-
Other EU	626	1,091
Total EU	1,070	1,769
Other Europe	-	357
Japan	2,141	5,279
Other Asia	811	422
Others	449	52
Total	4,523	7,952

Source: Central Bureau of Statistics (CBS). 2002 unpublished worksheets

**Table 10: Trade Matrix - Fresh Easy Peelers Export - \$000' (HS0805200)**

Destination	CY2002	CY2001
US	997	-
France	852	1,301
Germany	-	1
United Kingdom	1,884	3,247
Holland	36	40
Other EU	2,916	4,371
Total EU	5,688	8,960
Other Europe	2,234	2,523
Japan	-	-
Other Asia	-	143
Others	1,312	995
Total	10,231	12,621

Source: Central Bureau of Statistics (CBS). 2002 unpublished worksheets

## Policy

The decline in the importance of the citrus industry and the reduced production volume makes it easier for the Israeli policy makers to let market forces take hold without their intervention. Long term plans that were supposed to solve long term problems of the industry and needed financial support from the government were abandoned recently. The 2003 budget cut also prevents long terms plans. It seems that the growers too have finally accepted the idea that citrus is a declining industry and it is doomed to shrink further. The idea of an industry which relies mainly on domestic market was denied for many years by key people in the industry. It now becomes clearer that this is the track that the Israeli citrus industry is on. A significant illustration of the declining importance of the citrus industry is the "Councils Merging" law. Upon this law the Citrus Marketing Board's (CMBI) activities will be taken over by the "Fruit Production and Marketing Board". The Citrus Marketing Board will be closed by the end of CY2003.

## Marketing

See details in report IS2002.

MY2002 saw deeper attention paid by the CMBI to the local market. Expanded advertisement budget

was channeled to the domestic market at the expense of export markets. CMBI also expanded its marketing efforts in Japan in order to rehabilitate sales of the Sweetie variety in the Japanese market. No results for these efforts have yet been recorded and the Japanese market continues to shrink

**PSD Table - Oranges**

Country: Israel

Units: Thousand of Metric Tons

	Revised	2000	Prelim.	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begins		10/2000		10/2001		10/2002
Area Planted	7000	7000	6000	5600	5500	5300
Area Harvested	6950	6950	5900	5500	5400	5100
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total No. of Trees	0	0	0	0	0	0
Production	218	218	160	160	198	140
Imports	0	0	0	0	5	0
TOTAL SUPPLY	218	218	160	160	203	140
Exports	71	71	34	34	61	19
Fresh Domestic Consumption	62	62	62	62	70	56
Processing	85	85	64	64	72	70
TOTAL DISTRIBUTION	218	218	160	160	203	145

**PSD Table - Orange Juice**

Country: Israel

Units: Thousands of Metric Tons

	Revised	2000	Prelim.	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begins		10/2000		10/2001		10/2002
Delivery to Processors	85	85	64	64	72	70
Beginning Stocks	1	1	15	16	16	13
Production	52	52	41	39	43	42
Imports	50	50	45	48	42	40
TOTAL SUPPLY	103	103	101	103	101	95
Exports	51	49	35	56	50	53
Domestic Consumption	37	38	50	34	34	36
Ending Stock	15	16	16	13	17	6
TOTAL DISTRIBUTION	103	103	101	103	101	95

**PSD Table - Fresh Grapefruit (inc. Sweetie)**

Country: Israel

Units: Thousand of Metric Tons

	Revised	2000	Prelim.	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begins		10/2000		10/2001		10/2002
Area Planted	8,110	8,110	5,900	5,900	4,900	5,250
Area Harvested	7,310	7,310	5,700	5,700	4,700	5,250
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total No. of Trees	0	0	0	0	0	0
Production	316	286	251	251	255	227
Imports	0	0	0	0	0	0
TOTAL SUPPLY	316	286	251	251	255	227
Exports	94	63	68	68	91	59
Fresh Domestic Consumption	20	21	20	20	27	20
Processing	202	202	163	163	137	148
TOTAL DISTRIBUTION	316	286	251	251	255	227

**PSD Table - Fresh Tangerines**

Country: Israel

Units: Thousands of Metric Tons

	Revised	2000	Prelim.	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begins		10/2000		10/2001		10/2002
Area Planted	5960	5932	5000	5000	4800	4730
Area Harvested	5610	5132	4900	4900	4700	4550
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total No. of Trees	0	0	0	0	0	0
Production	81	80	83	83	100	85
Imports	0	0	0	0	0	0
TOTAL SUPPLY	81	80	83	83	100	85
Exports	30	30	25	25	35	28
Fresh Domestic Consumption	25	24	30	30	35	30
Processing	26	26	28	28	30	27
TOTAL DISTRIBUTION	81	80	83	83	100	85

**PSD Table - Tangerine Juice**

Country: Israel

Units: Thousands of Metric Tons

	Revised	2000	Prelim.	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begins		10/2000		10/2001		10/2002
Delivery to Processors	26	26	28	28	30	27
Beginning Stocks	2	2	8	2	8	2
Production	14	14	15	15	16	15
Imports	20	24	25	20	20	25
<b>TOTAL SUPPLY</b>	<b>36</b>	<b>40</b>	<b>46</b>	<b>37</b>	<b>44</b>	<b>42</b>
Exports	18	25	23	20	22	25
Domestic Consumption	10	13	15	15	14	13
Ending Stock	8	2	8	2	8	4
<b>TOTAL DISTRIBUTION</b>	<b>36</b>	<b>40</b>	<b>46</b>	<b>37</b>	<b>44</b>	<b>42</b>

**PSD Table - Fresh Lemons**

Country: Israel

Units: Thousands of Metric Tons

	Revised	2000	Prelim.	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begins		10/2000		10/2001		10/2002
Area Planted	1150	1150	1700	1700	1800	1700
Area Harvested	1100	1100	1250	1250	1550	1550
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total No. of Trees	0	0	0	0	0	0
Production	16	16	19	20	30	23
Imports	0	0	0	0	0	0
TOTAL SUPPLY	16	16	19	20	30	23
Exports	0	0	0	1	3	2
Fresh Domestic Consumption	15	15	15	15	16	16
Processing	1	1	4	4	11	5
TOTAL DISTRIBUTION	16	16	19	20	30	23

**PSD Table - Fresh Citrus, Other**

Country: Israel

Units: Thousands of Metric Tons

	Revised	2000	Prelim.	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begins		10/2000		10/2001		10/2002
Area Planted	1420	1420	830	830	800	540
Area Harvested	1300	1300	700	700	670	500
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total No. of Trees	0	0	0	0	0	0
Production	15	15	11	12	8	15
Imports	0	0	0	0	0	0
TOTAL SUPPLY	15	15	11	12	8	15
Exports	9	9	2	9	5	10
Fresh Domestic Consumption	6	6	2	2	3	2
Processing	0	0	7	1	0	3
TOTAL DISTRIBUTION	15	15	11	12	8	15